



**FORM 40A** FULL YEAR RESIDENTS ONLY **Alabama Individual Income Tax Return 1996**

For individual taxpayers whose income does not exceed \$20,000 (single) or \$40,000 (married filing joint)

L A B E L  H E R E	Your first name and initial (if joint return, also give spouse's first name and initial)	Last name
	Present home address (number and street or P. O. Box number)	
	City, town or post office, state, and ZIP code	

PLACE LABEL HERE

Your social security number	
:	:
:	:
Spouse's soc. sec. no. if joint return	
:	:
:	:

FN (For official use only)

**Filing Status and Exemptions**  
Check only one box

- |   |                          |   |
|---|--------------------------|---|
| 1 | <input type="checkbox"/> | \$1,500 Single  |
| 2 | <input type="checkbox"/> | \$3,000 Married filing joint return (even if only one spouse had income)                        |
| 3 | <input type="checkbox"/> | \$1,500 Married filing separate return. Complete line 5 with spouse's name and soc. sec. no.    |
| 4 | <input type="checkbox"/> | \$3,000 Head of family (with qualifying person). (See page 7 of instructions.) Complete line 5. |

5 Name \_\_\_\_\_  
Soc. Sec. No. \_\_\_\_\_  
Relationship \_\_\_\_\_

**Income and Adjustments**

6 Wages, salaries, tips, etc. (list each employer and address separately).		A — Alabama tax withheld		B — Income		
a		a		6a		
b		b		6b		
c		c		6c		
d		d		6d		
7	Other income. If over \$400.00, use Form 40. . . . .				7	
8	Federal income tax refunds received in 1996. (see page 8 of instructions) . . . . .				8	
9	Total income. Add lines 6a through 6d, 7, and 8 (column B) . . . . .				9	

**Deductions**  
FOLD HERE

10	Standard Deduction (complete Part III, and enter amount here) . . . . .	10	
11	Federal income tax withheld and paid during 1996 (see page 9 of instructions) . . . . .	11	
12	Personal exemption (from line 1, 2, 3, or 4) . . . . .	12	
13	Dependent exemptions (from page 2, Part II, line 2) . . . . .	13	
14	Total deductions. Add lines 10, 11, 12, and 13 . . . . .	14	

**Tax and Payments**

Staple check or money order on top of Form(s) W-2, W-2G, and/or 1099.

15	Taxable income. Subtract line 14 from line 9. Enter the result (but not less than zero) . . . . .		15	
16	Find the tax on the amount on line 15. Use the tax table in the Instruction Booklet. . . . .		16	
17	Alabama Election Campaign Fund. You may make a voluntary contribution of \$1, or \$2 if joint	a Alabama Democratic Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none b Alabama Republican Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17a	
18	Total tax liability and political contribution. Add lines 16, 17a, and 17b . . . . .		18	
19	Alabama income tax withheld. Add lines 6a thru 6d, column A . . . . .		19	

**AMOUNT YOU OWE**

20	If line 18 is larger than line 19, subtract line 19 from line 18, and enter <b>AMOUNT YOU OWE</b> . Attach check or money order for the full amount payable to "Alabama Department of Revenue" . . . . .	
----	---	--

**OVERPAID**

21	If line 19 is larger than line 18, subtract line 18 from line 19 and enter amount <b>OVERPAID</b> . . . . .
----	---

I wish to donate a part of my tax refund to the following:

**Donation Check-offs**

22a	Alabama Aging Fund (enter \$1, \$5, \$10, none, or other amount) . . . . .	22a	
b	Alabama Arts Development Fund (enter \$1, \$5, \$10, none, or other amount) . . . . .	22b	
c	Alabama Nongame Wildlife Fund (enter \$1, \$5, \$10, none, or other amount) . . . . .	22c	
d	Child Abuse Trust Fund (enter \$5, \$10, \$25, none, or other amount) . . . . .	22d	
e	Alabama Veteran's Program (enter \$1, \$5, \$10, none, or other amount) . . . . .	22e	
f	Alabama Indian Children's Scholarship Fund (enter \$1, \$5, \$10, none, or other amount) . . . . .	22f	
g	Penny Trust Fund (enter \$1, \$5, \$10, none, or other amount) . . . . .	22g	
h	Foster Care Trust Fund (enter \$1, \$5, \$10, none, or other amount) . . . . .	22h	
23	Total. Add lines 22a, b, c, d, e, f, g, and h. . . . .	23	

**PLEASE**

- Verify your social security number
- Recheck your math
- Sign return below
- Attach W-2 form(s)

**REFUND**

24	REFUNDED TO YOU. Subtract line 23 from line 21. (CAUTION: You must sign this return before it can be processed.) . . . . .
----	---

**Please Sign Here**

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements and to the best of my knowledge and belief they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature	Date	Daytime Tel. No.	Spouse's signature (if filing jointly, BOTH must sign)
-----------	------	------------------	--

**Paid Preparer's Use Only**

Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Preparer's social security no.
Firm's name (or yours, if self-employed) and address	E.I. No.		ZIP Code

**PART I****General Information**All Taxpayers  
Must Complete  
This Section


- 1 Were you (and your spouse, if married filing jointly) a resident of Alabama for the entire year 1996? ..... ☐ Yes ☐ No  
If you checked no, **DO NOT COMPLETE THIS FORM.** See "Which Form To File" on page 5 of instructions.
- 2 Did you file an Alabama income tax return for the year 1995? ..... ☐ Yes ☐ No  
If you checked no, state the reason for not filing. \_\_\_\_\_
- 3 Give name and address of your present employer:  
Yourself \_\_\_\_\_  
Your Spouse \_\_\_\_\_
- 4 Your occupation \_\_\_\_\_ Spouse's occupation \_\_\_\_\_
- 5 Enter your Adjusted Gross Income reported on your **1996 Federal** Individual Income Tax Return: \$ \_\_\_\_\_
- 6 Do you have income which is reported on your Federal return, but not reported on your Alabama return? ..... ☐ Yes ☐ No  
If yes, enter source(s) and amount(s) below (*other than state income tax refund*):  
Source \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Source \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Source \_\_\_\_\_ Amount \$ \_\_\_\_\_

**PART II****Dependents**Do not include  
yourself or  
your spouse

(See page 10)

- | 1a Dependents:<br>(1) First name | Last name | (2) Dependent's social security number. | (3) Dependent's relationship to you. | (4) Did you provide more than one-half dependent's support? |
|----------------------------------|-----------|---|--------------------------------------|---|
|                                  |           |   |                                      |   |
|                                  |           |   |                                      |   |
|                                  |           |   |                                      |   |
|                                  |           |   |                                      |   |
- b Total number of dependents claimed above .....
- 2 **Amount allowed.** (Multiply \$300 by the total number of dependents claimed on line 1b.)  
Enter amount here and on page 1, line 13 ..... 2

**PART III****Standard Deduction Computation**All Taxpayers  
Must Complete  
This Section

- Indicate the filing status you checked on page 1, Form 40A:
- Filing Status**
- 1 ☐ Single
- 2 ☐ Married filing joint
- 3 ☐ Married filing separate
- 4 ☐ Head of family
- 1a Enter total income as shown on line 9, page 1, Form 40A ..... 1
- b Multiply this amount by 20% .....   x 20%
- 2 Enter the result on this line ..... 2
- 3a If you checked filing status 1, 3, or 4, enter \$2,000, or
- b If you checked filing status 2, enter \$4,000 ..... 3
-  **Standard deduction allowable.** Compare the amounts on lines 2 and 3 above.  
Enter **ONLY THE SMALLER AMOUNT** on line 10, page 1, Form 40A.

**Final Checklist****Before Mailing Your Return Have You –**

- Checked your name and address to see if it is correct? Your refund will be mailed to the address shown on your return. (Use your peel off label if you have one.)
- Entered your social security number(s) in the space(s) provided?
- Attached all of your withholding statements?
- Signed your return? If filing a joint return, your spouse must also sign.
- Attached check or money order for Amount You Owe?
- Made a copy of this return for your records? You will need a copy in case you have questions about your return after you have mailed it to us.
- Used the mailing envelope provided in the booklet mailed to you?

**Each year thousands of refunds are delayed because of incorrect addresses or other errors. Please take a few minutes to check your return before you mail it. Filing a complete and accurate return will help us process your refund faster.**

**Where To File Form 40A**

If an addressed envelope came with your return, please use it. If you do not have one, mail your return to one of the addresses below.

If you are due a refund, mail your return to:

Alabama Income Tax Division  
P. O. Box 327465

Montgomery, AL 36132-7465

If you are not due a refund, mail your return to:

Alabama Income Tax Division  
P. O. Box 327477

Montgomery, AL 36132-7477

Mail **ONLY** your 1996 Form 40A to the above address. Amended returns and all other correspondence should be mailed to: Alabama Department of Revenue, Income Tax Division, P.O. Box 327410, Montgomery, AL 36132-7410.